The Otto Bremer Trust

Founded in 1944, the Otto Bremer Trust invests in diverse and dynamic organizations in the Upper Midwest

Otto Bremer Trust has more than $1 billion in assets that work for the benefit of people, places, and communities in the Upper Midwest Whether it takes the form of grantmaking, hybrid investments, or program-related investments portfolio management, the Otto Bremer Trust has:

Invested In Over
600 Organizations

Impacted
162 Communities

Otto Bremer Trust selected Sputnik Moment to **modernize its grant making technology with the innovation driven Salesforce platform and foundation Connect**

The Challenges

The previous Grant Management system was home grown (custom), and offered no ability to make modifications in-house. This limited Otto Bremer's ability to adapt the system to its own needs and processes

Lot of time spent on data entry. Because there was no Grantee portal, proposals and related documents were mailed/emailed, scanned onto CDs, and then manually input into the system, taking precious staff time. Also all decisions during trustee meetings were entered in a spreadsheet and later manually added to the system

The previous GMS was built with the Application itself being the "main" record, without any relationships to other records. This meant they had no insight into how many times the same Organization applied for a grant, or how a Contact was related to an Organization for instance

The Solution

Otto Bremer Trust selected the Salesforce platform for its flexibility, overall high security and selected foundationConnect for its built-in grant management features

In order to facilitate the transition, Otto Bremer Trust engaged Sputnik Moment, the leading foundation Connect implementer Otto Bremer Trust valued having a true relational database like Salesforce in addition to their Grant Management System. This gave them a complete history for each organization they fund

The solution designed by Sputnik Moment was focused on eliminating duplicative work, avoid unnecessary manual entry and process automation. For example, a docket List View allowed decision to be captured directly into Salesforce during trustee meetings. Also the board book is now dynamically generated using Mailmerge app within foundationConnect.

> **"**
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> *Sputnik Moment listened to our needs and help customize Salesforce foundationConnect in a way that truly transformed our work!*
>
> **Kari S. - Grants Administrator**

The Benefits

Applications can be submitted directly via an online grants portal. Grant seekers can keep track of their proposal status and the foundation can notify grant seekers more quickly if the application is missing information

Board Meeting preparation is now made easier with the generation of supporting documents for the board book. Significant time is also being saved by allowing attachments to be collected on the portal. No need for document scanning

Custom user profiles with granular permissions gave the grants manager control on what users could do or see and in some cases limiting program officers' ability to edit sensitive fields

Program officers are empowered and no longer have to rely on grants manager for reports and for other vital pieces of information

Grants Administrator now have a wide range of ability to customize system elements

Program Related Investment (PRI) fits nicely into the system. Repayment schedule is being tracked and reminders are automatically sent when payments were due

Ready to grow with Salesforce and FoundationConnect?

If you're interested in talking about how your organization can implement Salesforce, our team is ready to help.

www.sputnikmoment.com

salesforce.org

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